

GUIDE TO IMPLEMENTING THE SAFETY CLIMATE SURVEY

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Completing the Safety Climate Survey

Who should participate in the survey?

We recommend that all practice staff and anyone involved in or considered part of the practice team complete the survey. However, it remains at the discretion of individual practices to decide who they invite to participate.

Getting started

1. Practice manager or nominated person accesses the webpage www.healthcareimprovementscotland.org/safetyclimate.aspx and selects 'login'.
2. If this is the first time your practice has conducted the survey, you will have to register. Otherwise, the 'login' details from a previous survey should be used. The user name is the national practice code – please only enter practice code number – **not** any letters. There is a 'forgotten password' function if required (see Frequently Asked Questions)
3. If your practice has never conducted the safety climate survey before click 'get started'.
4. You will require to send out staff invitations each time the practice carries out a safety climate survey. If your practice completed a previous survey but you wish to send out new invitations for this year, click 'start new survey'.
5. Select 'Add another staff member'.
6. If you would like an automatic email invitation to be sent to a member of staff, please put their email address – the tick box will automatically default to ticked. If the person does not have an email address, include the staff name and then you can download a paper copy invitation. Remember to untick the 'untick if name, not email entered' box. Remember to add your own email!
7. Repeat steps 5 and 6 until the names of all team members have been entered, then select 'save staff' under section 2. **Once you have clicked on 'save staff', email invitations will be sent automatically.** It is possible to add more staff later, but it is generally better if all staff receive the invitation at the same time. At this stage, you may want to take a note of how many invitations have been sent.
8. Next to each name there will be text showing 'not completed' and a link to download and/or print a paper copy of the invitation.
9. If a staff member does not have an email address, download and print each individual invitation. If you prefer to email the invitations yourself, download and email them through your NHS mail account. Distribute to named individuals.
10. If you have entered a staff email address an automatic invitation will be sent.
11. If you make an error in a staff email address, click on 'edit' and you will have the option to amend the email address.

Note: Some email systems classify emails sent by the system as spam and move them to the 'junk' folder – particularly if you are using an nhs.net email. These should be moved to the recipient's inbox.

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Completing the survey

- Each staff email/letter includes the link to complete the survey, and an automatically generated unique code, to allow participants to participate in the survey.
- When staff members complete the survey, the text next to their names will change from 'not completed' (in red) to 'complete' (in blue) to allow monitoring of response rates. Updates occur automatically each time you login. You can check progress when you log in and click 'check current survey'.

Generating your Safety Climate Survey Report

- Once all participants have completed their survey or an appropriate amount of time has elapsed, you should login and select 'check current survey'.
- Scroll down to section 3. (At this stage, you may want to take a note of how many people completed the survey, or you can check this information at a later date, by selecting the 'view previous results' tab on the 'Home' page.)
- Select 'download report' and the report will be automatically generated.
- You can save a copy in portable document format (pdf) for further discussion.

General points:

- Reports can only be generated after at least **three** individual questionnaires have been completed.
- Once a report has been downloaded, practice team members who did not complete the survey **will not be able** to participate.
- Individual responses are not available to ensure participant anonymity.
- The demographic questions in the final section of the survey are to allow comparisons between different regions and participant characteristics.
- The report includes a comparison of your results with all other practices who undertook the survey during the preceding six months. It also compares current perceptions with results of your previous surveys (if applicable).

Next steps

Conducting a safety climate survey and generating a report for your practice team are important steps in building a strong and positive safety culture. We strongly encourage practices to disseminate the report to everyone in their team and to reflect on and discuss the findings during a dedicated meeting.

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Frequently Asked Questions

What do I do if I have forgotten my password?

You can reset your password by:

- going to the login page
- clicking 'Forgotten your password?'
- entering your practice code and email address

A new password will be emailed to you.

(NOTE: only someone whose email has been registered on the system can reset the password. If that person no longer works with the practice, please contact the SPSP Primary Care team (hcis.psipcteam@nhs.net) with the new email address.)

I have received a new password but it does not work

When you receive a new password please retype it rather than copy and paste it. If, however, you decide to copy and paste the new password, please make sure that you do not copy a blank space after it. The system will recognise this blank space as an additional character and return an error.

I have tried to reset the password but I have not received an email with a new password

If you have not received an email with your new password please check your 'junk mail' folder – some email systems classify emails sent by the system as spam and move them to the 'junk' folder – particularly if you are using an nhs.net email.

Our Practice Manager has left and did not leave the password and their email address was registered on the system for our practice.

To change the registered email address please contact the team with the new email address.

I have added an incorrect email address or staff name to the system. Can this be removed?

If you have entered a name or email address incorrectly you can just leave it and re-enter the correct details. Even though the incorrect entry will show as 'not completed', once the report is run they will not be taken into account when calculating the results. If you require to remove a staff name or email please contact the team.

I tried to produce a report but I have not received an email with the link

If you have not received a link to the report please check your 'junk mail' folder. Some email systems classify email from the safety climate system as spam and move them to your 'junk' folder.

If you are still experiencing problems please contact the team: (hcis.psipcteam@nhs.net)

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Safety Climate Survey Definitions

Section Definitions

- a) **Workload** - this factor covers: impairment of performance by excessive workload, inadequate staffing levels, time constraints, and expectations of staff when working under pressure
- b) **Communication** – this factor covers: the degree to which discussion between team members at all levels are open and honest, staffs perceived freedom to question management decisions and whether staff are kept up to date with current developments and vision of leaders for the practice
- c) **Leadership** – this factor covers: whether existing hierarchies are perceived to have detrimental effects on work, the consequences to staff who highlight significant events, the effectiveness of leadership within teams, whether leaders are open to suggestions for improvement and attitudes towards rules and formal procedures,
- d) **Teamwork** - this factor covers: the perceived importance of teamwork, level of mutual respect and support within teams, whether disagreements are dealt with effectively and level of job satisfaction.
- e) **Safety Systems & Learning** – this factor covers: the degree to which practices encourage reporting of significant incidents, existence of procedures to prevent patient safety incidents, participation of all staff members in the development of protocols, risk assessment and significant event analysis, the extent to which practices assess potential threats and pro-actively safeguard staff and patients' safety.

Staff Definitions

- a) **Management:** GP partners and practice managers.
- b) **Non management:** all other practice employed staff.
- c) **Clinical:** all medical, nursing and phlebotomy staff employed by the practice as well as clinical staff employed by the health board (district nurses).
- d) **Non Clinical:** all other staff employed by the practice.

General Definitions

- a) **Practice:** The general medical practice which is undertaking this survey.
- b) **Significant event:** Any event thought by anyone in the team to be significant to the care of patients or the conduct of the practice.
- c) **Team members:** All types of general practitioners, GP trainees, practice staff, practice nurses and practice managers, regardless of their working pattern or whether they are self employed or employed by the practice.
- d) **Attached team members:** Community health nurses, district nurses, social workers, health visitors and any other staff.
- e) **Practice leadership:** GP partners and practice managers.

Negative questions

Please note: where data for negative questions (within both leadership and workload sections) is presented, the results have been reversed, and a high score is therefore desirable.

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Making the Most of Your Safety Climate Survey Report

The delivery of the report is one of the important steps in the process to build a strong and positive safety culture – it is **not** the end point. Further steps include:

- *Sharing* the results with all **practice team members**, including those who did not participate
- **Discuss and reflect** on the findings in the report. A practice team meeting is the ideal setting for this.

The template below will help guide you to successfully facilitate your discussion, however it is completely flexible and you may chose to use all, parts, or none of it, depending on your individual practice needs.

Step 1 Identify the number of team members that participated in the survey

Reflective question and *potential implications*:

- How many team members participated and how many were expected to have completed the survey? *A large number of participants is desirable, to ensure the results reflect the perceptions of the whole practice.*
- Do the non-participants have specific characteristics in common? *If they do, it makes it more difficult to interpret the rest of the report with confidence.*
- Why did some team members not participate? *There may be opportunities to promote the survey, or reconsider the timing, e.g. in regard to school holidays.*

Step 2 Identify a safety climate factor/s in section 1 (e.g. workload) that reflects a positive perception in the practice (do not consider other practices' scores yet)

Reflective question and *potential implications*:

- Why do you think this positive perception is accurate? *Sometimes a positive perception and the reality do not quite 'match up'.*
- How has this been achieved? *This question is helpful to allow members to reflect on practice and team strengths.*
- What lessons (if any) can be learned and what actions can be taken to ensure that this area stays positive or improves, and that can be transferred to other areas?

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Step 3 Identify a safety climate factor/s in section 1 (for example, communication) that reflects a less positive perception in the practice (do not consider other practices' scores yet)

Reflective question and *potential implications*:

- Why do you think this less positive perception is accurate?
- Why is this specific area perceived as less positive?
- What actions could be taken to improve perceptions in this area? *It may not always be possible or desirable to 'improve' given practice's other priorities.*

Step 4 Compare your team's results to the average of other practices. Look for differences and the size of those differences (if any).

Reflective question and *potential implications*:

- Are your scores (perceptions) mostly comparable? *This would be the case for the majority of teams and areas.*
- Are there any areas where your perceptions are more positive or negative than average? *A difference does not imply 'better or worse' or 'right or wrong'. However it does provide an opportunity for reflection and consideration.*
- What evidence (if any) is there to substantiate the observed differences?

Step 5 Consider sections 2 and 3 (managers versus non managers/clinical versus non clinical) and look for any obvious differences between staff groups

Reflective question and *potential implications*:

- Are there any obvious differences between staff groups? More specifically, is one staff group constantly perceiving things more positively or negatively than another? Is the difference only in one area? *If there are differences between only one group, it is likely to be important.*
- Why is there variation between groups? *This is a good opportunity to share individual experiences.*
- How can perceptions be aligned (if this is considered important)? *It can be difficult and counter-productive to try and establish which group is 'right'.*

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Step 6 Compare your current safety climate results with your previous perceptions (if applicable)

Reflective question and *potential implications*:

- Are there noticeable differences (either more positive or more negative) in perceptions?
- What more could (or should) be done at this stage?

Step 7 Take a few moments to summarise the main discussion and action points, and check for agreement.

Given all the questions and discussions so far:

- Is there a specific climate area that should be further developed?
- What 'tests of change' if any, could be made?

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Safety Climate Survey Practice Action Plan

Please use this form to summarise your practice discussions and action plan on your safety climate survey report.

Practice Name	
Practice Number	
Date of team discussion	

Following your Safety Climate Survey last year, what plans were made and what did you do to develop your team's safety culture? Did this have an impact on your Safety Climate Survey results this year?

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This year what positive aspects of your team's safety culture were highlighted in the report and your discussions?

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What aspects of your safety culture do you as a team feel you could improve?

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What steps will you take to improve these aspects of your safety culture?

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Would you like any support or guidance to make changes in your practice? If so, what would be useful?

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